VIRTUAL CEO *Life*

Virtual Emily

WHITE PAPER · VIRTUALLEADGEN · 2026

# Sales Emily: Lead Generation




**AI for the volume. A human for the conversation.**

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VANTECH

A NOTE FROM JOE

# Ready to change your life?

The Virtual CEO knows that mobility and time are the new freedom. In sales, that means one thing: your pipeline can't depend on you remembering to follow up. This white paper explains how we build a lead generation machine for you, with AI doing the volume and a trained Sales Emily doing the conversations.

It is the same engine I used, as a VP of Sales, to help take a startup from zero market share to more than 500 clients in under six years. Those were that company's numbers, not a promise for yours. The method is what transfers.

> **"Finding the right people to call is as important as the call itself."**
>
> Joe Da Silva, founder of Vantech Group

## What's inside


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| 02 | Why lead generation | Why bought lists and cold dialing fail |
| 03 | Define your market | Who exactly should we look for? |
| 04 | Define a lead | Warm or cold, and which data fields make it usable |
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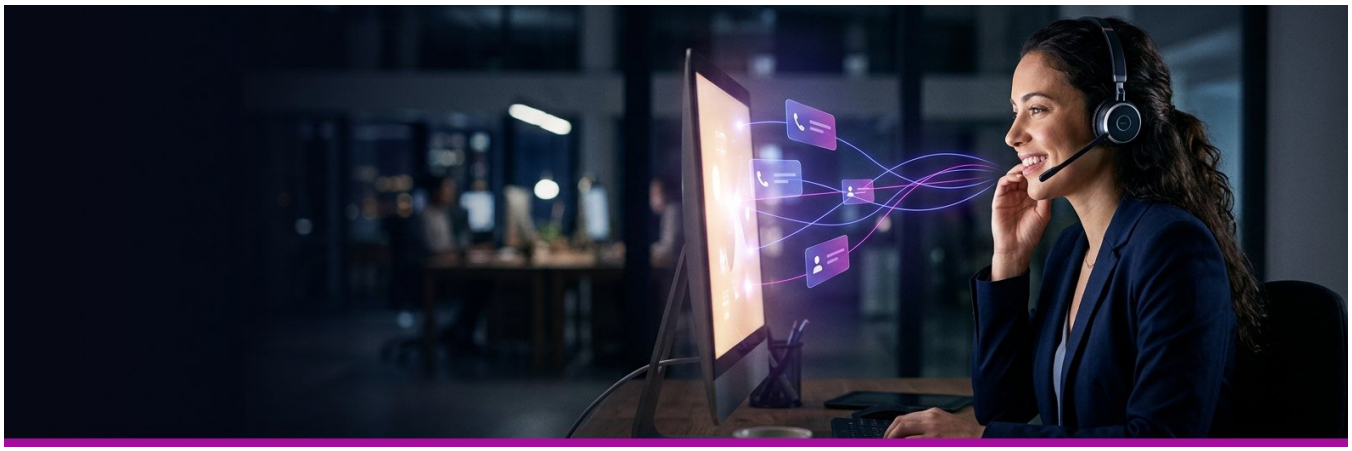


SECTION 01

# What is VirtualLeadGen?

VirtualLeadGen combines lead generation research and appointment setting to change the way small businesses sell. It is module 01 of MyVirtualBPO, and it is run by a Sales Emily: a bilingual, trained sales professional in your time zone.

We manage your data and turn it into warm leads in real time, then work them with outreach and calls until they become meetings in your calendar. Three things happen at once:



*Meet Sales Emily: AI does the volume, she does the conversations.*




*The three engines of B2B lead generation: research, social media and appointment setting.*

| Engine | What it does | Who does it |
|---|---|---|
| **Lead generation** | Finds companies that fit your profile, the decision-makers inside them and their verified contact data | AI research, checked by a Sales Emily |
| **Social media** | Builds presence and reaches prospects on LinkedIn and your other networks | Sales or Marketing Emily |
| **Appointment setting** | Works replies, follows up by email and phone, and books meetings into your calendar | Sales Emily |

Sales & RevOps Emilys start from $2,150/mo. The VirtualLeadGen CRM module can be licensed on MyVirtualBPO.
**See VirtualLeadGen**



SECTION 02

# Why lead generation?

Simple: you want appointments, because appointments become sales. Picture a thick database and a phone. First call, no answer. Second, voicemail. By the ninety-ninth, still no meeting. The pitch was never the problem. The list was.

## You need a lead generation process if…

- Your database has never been updated, or nobody trusts it.
- You have a sales team hungry to sell by phone, with no fresh data to work.
- You need meetings booked by a team that does nothing else.
- You want brand awareness and email campaigns that actually bring replies.

## "I already bought a database. Why do I need this?"

Many of our clients thought they had bought the perfect list. When they started calling, people no longer worked there, companies had closed, phones were disconnected, and there was nothing on the decision-maker to build a pitch around.

A tailor-made process gives you something a list never will: a machine that keeps researching, verifying and booking, week after week.

Read more: **Lead generation: 3 reasons it's the future of business development**

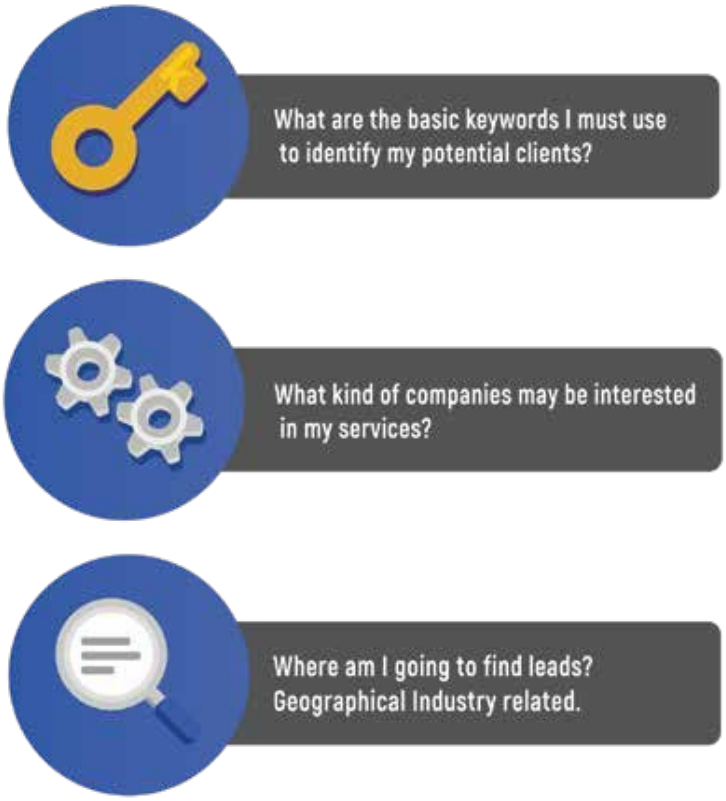


SECTION 03

# Define your market

You know your business best. Knowing your target client is how we decide which leads to look for. Leads are not leads without contact information, or without something that makes them likely to need you.

| Question | Examples |
|---|---|
| **What industry will we focus on?** | Healthcare, construction, real estate, professional services, marketing agencies, SaaS |
| **How big should the companies be?** | Revenue range, number of employees, number of locations |
| **Where are they?** | States, cities, regions, or "US-wide" |
| **What department are we trying to reach?** | Executive, operations, HR, marketing, IT, business development |
| **Which position decides?** | Founder or CEO, COO, VP of Operations, HR director, office manager |
| **What information do we need?** | Direct phone, verified email, LinkedIn, website, HQ address |




*Define your ideal customer profile: keywords, company type and where to find leads.*

*Who is your buyer? A decision-maker with enough authority to buy your service. Everyone else is research, not a lead.*




SECTION 04

# Define a lead

The most accurate definition of a lead: someone who is interested in your business and your services. That's it. No way around it.

Every business is unique, and so are its leads. It takes time and continuous feedback between the lead generator, sales and marketing.

## Warm and cold leads

| | Warm leads | Cold leads |
|---|---|---|
| **What they are** | People already showing interest in your business | People who fit your profile but haven't raised their hand |
| **Where they come from** | Inbound emails, job postings that fit your service, referrals, past meetings, old clients, networking | Databases built on your decision-maker profile, email, social and cold call campaigns |
| **How we work them** | Fast follow-up and booking | Research, sequences, then calls |




*Warm leads vs. cold leads: where each comes from and how to work it.*

## The fields that make a lead usable

| Company | Decision-maker |
|---|---|
| Name, industry, website, size | Name, position, direct phone |
| Corporate phone and address | Verified email and LinkedIn |




SECTION 05

# Create a sample file

Now that you know the leads you need and where to find them, put it into practice with a small sample file before anyone scales anything.

> **"The sample file is the foundation of the lead generation process."**
>
> The VirtualLeadGen method

If the sample file doesn't work, the rest of the leads won't either. If it's well done and proves itself when you try it, the leads built around it will work too.

## How to build it

- **Start from your current clients.** They are the basis of the profile and the keywords.
- **Pick 50 to 100 companies** that match the profile from Section 03.
- **Fill every field** from Section 04, and verify emails and phones.
- **Work it for two weeks.** Outreach and calls, then compare replies and meetings with what you expected.
- **Adjust and scale.** Keep what booked meetings; drop what didn't.



SECTION 06

# The sales cycle and KPIs

Lead generation plus appointment setting is a cycle, not a campaign. Each turn makes the data, the message and the meetings better.




*The LeadGen + appointment setting sales cycle: from lead generation to a VCEO-run pipeline.*

## What to measure

| KPI | What it tells you |
|---|---|
| **Appointments booked** | The main output of the machine |
| **Conversion rate on sales** | How many meetings become clients |
| **Contacts researched and verified** | Whether the research engine is keeping up |
| **Reply rate** | Whether the profile and the message fit |
| **Cost per lead and lead value** | Whether the investment pays. Lead value = average customer value × lead-to-customer rate |

Worked example and formula: **How much is a business lead worth?**

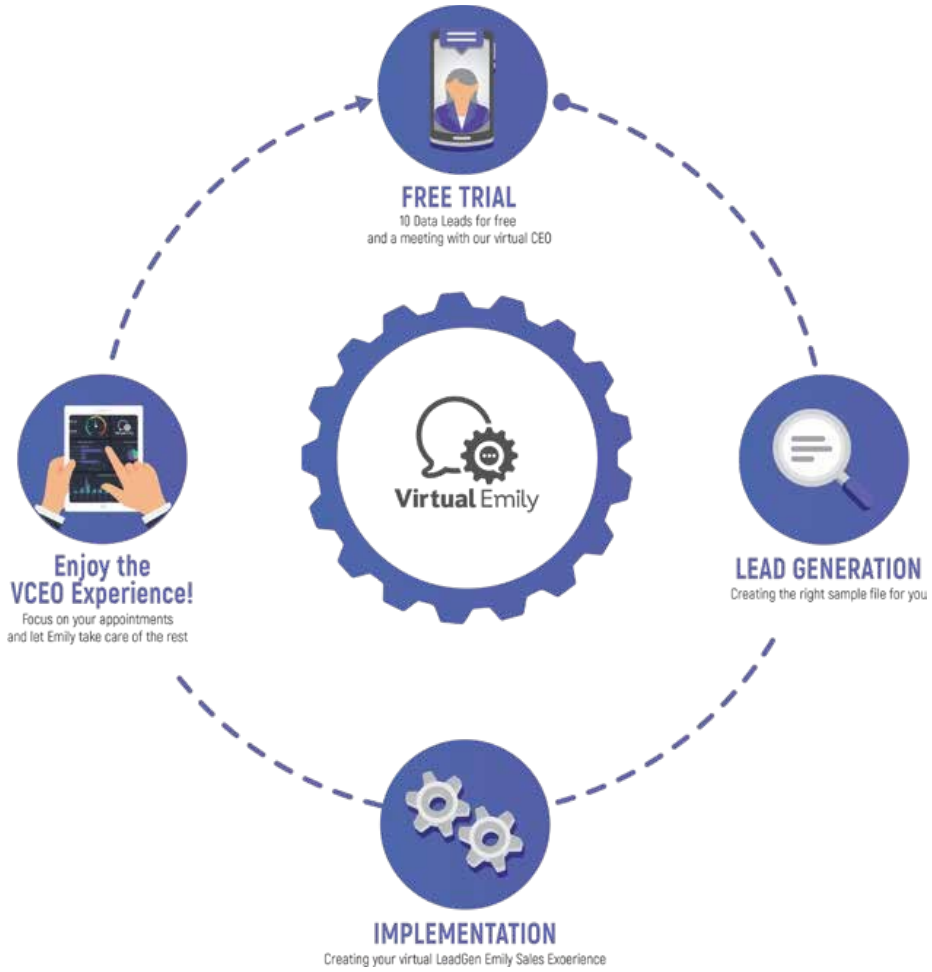


SECTION 07

# How we make it happen

We start by consulting with you on your goals, then write a Statement of Work so everyone knows what success looks like.

| Step | What happens |
|---|---|
| **1. Define** | Sources, keywords, decision-maker profile and the KPIs that define success for you. |
| **2. Sample file** | We build and test the sample file with your feedback, and set the project scope and milestones in the SOW. |
| **3. Implement** | Your Sales Emily starts outreach, calling and appointment setting, tracked on MyVirtualBPO. |
| **4. Execute and improve** | Continuous feedback between your Sales Emily and your team, based on meetings and warm leads, toward the milestones. |




*How VirtualLeadGen works: trial, lead generation, implementation and the VCEO experience.*

SECTION 08

# FAQ

### What's the first step?

Read this white paper and do your homework: fill in the brief below. Then we build the sample file.

### How many leads will I get per week?

It depends on your criteria and your market. The sample file gives you a realistic weekly estimate before you scale.

### Can lead generation and appointment setting be automated?

Partly, and it should be. You need a CRM: the VirtualLeadGen module on MyVirtualBPO, or tools like HubSpot or GoHighLevel. AI handles the research and sequences; your Sales Emily handles the conversations.

### What makes someone good at lead generation?

Research experience, a results-driven mindset, computer skills and phone skills. We headhunt and train Sales Emilys for exactly this.

### What if a lead has incorrect information?

It goes back into the cycle. Lead generation plus appointment setting repeats until the data is right and the meeting is booked.

### What if I don't have time to manage a CRM?

Your Sales Emily runs it for you, and you see real-time updates on your phone. That is the Virtual CEO experience.

## Your ICP brief

| | |
|---|---|
| **Industries** | |
| **Company size** | |
| **Geography** | |
| **Decision-maker titles** | |
| **Your best 3 current clients** | |
| **What you want booked (meeting type)** | |

## From the Virtual CEO Life blog

- Virtual lead generation: my fascination with data and sales
- How much is a business lead worth?
- Lead generation: 3 reasons it's the future of business development

YOUR NEXT STEP

# Fill your pipeline without doing it yourself.

Tell us who you sell to. We'll show you how VirtualLeadGen and a Sales Emily would work your market.

## See VirtualLeadGen

AI for the volume, a human Sales Emily for the conversation, every meeting tracked on MyVirtualBPO.

**virtualleadgen.com →**

**Not sure where to start?** Book the free 60-minute EMOP Diagnostic with Joe at **joethevceo.com**.

More free guides: **virtualceolife.com/blog/resources.html**

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